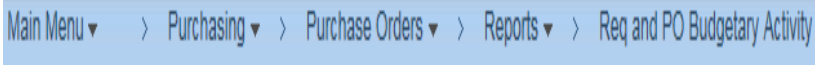


LAST REVISED DATE: 02/26/2018

General Information

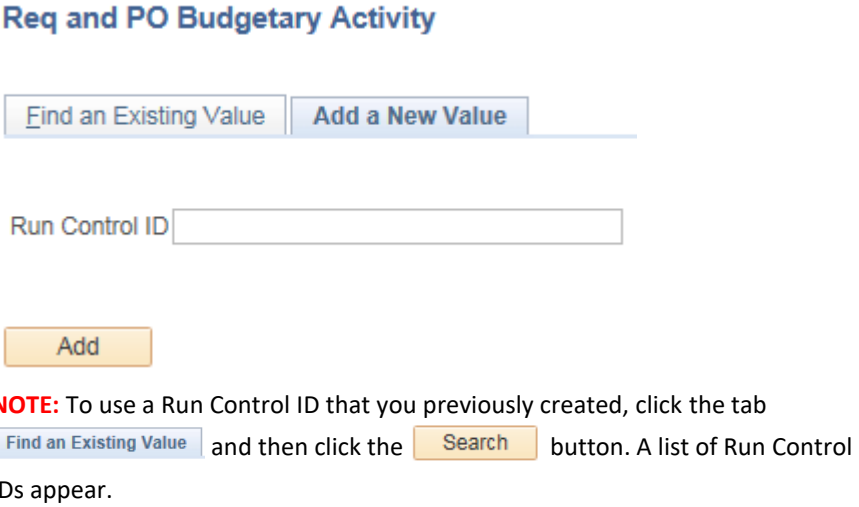
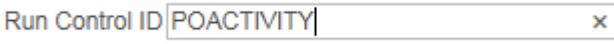
Task	Process Information
Running the Purchase Order Budgetary Activity Report	The PO Budgetary Activity Report provides budgetary amount information for purchase orders (POs) according to report request parameters.

GEARS Navigation

Main Menu> Purchasing > Purchase Orders > Reports > Req and PO Budgetary Activity	
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1.0 Process

This document is intended to provide a quick reference to running the PO Budgetary Activity Report in GEARS.

STEP	ACTION	DETAILS
1.	<p>Create the Run Control ID. The first time you run the PO and Req Budgetary Activity Report, you must create a new Run Control ID. Click on the Add a New Value tab.</p> <p>NOTE: A Run Control ID is the name that will be given to the saved parameters you select for the report. You can run the same report again in the future by selecting the same Run Control ID when using the Find an Existing Value tab. No spaces are allowed in the Run Control ID. In addition, the report parameters for a Run Control ID can also be changed after selecting the ID.</p>	
2.	<p>Enter a Run Control ID. In this example, "POACTIVITY" is used as the Run Control ID.</p>	

3. Click the **Add** button.

4. Specify the Report Parameters. The **Report Selection Parameters** page displays. The report parameters determine what information appears in the report.

Notes: Fields with an asterisk (*) must be completed.

Req and PO Budgetary Activity

Run Control ID POACTMITY
Language English

Report Manager Process Monitor **Run**

Report Request Parameters

*Business Unit MDJUD

*Budget Date From 07/01/2016

*To 06/30/2017

Remaining Amount >=

0.000 USD

Business Unit GL MDJUD

ChartField Sort Options

Personalize Find View All 1 of 1 Last

*ChartField	Short Name	From ChartField Value	To ChartField Value
PRODUCT	PCA	90001	90001

Save Return to Search

Add Update/Display

Report Request Parameters Fields	Description
Business Unit	Business Unit will always be MDJUD.
Budget Date From / To	Enter the budget period of the fiscal year (e.g., From: 07/01/XX/ To: 07/31/XX).
Remaining Amount	Enter the desired remaining amount. NOTE: (optional) use the dropdown box to limit results based on operator parameters (e.g., greater '>' /less '<' than or equal to '= ' a desired remaining amount). If you are attempting to view all transactions with remaining balances, you should select the '<>' (Not Equal to) dropdown and 0.000 amount. This selection will allow open POs with either positive or negative balances to display.
Business Unit GL	Business GL Unit will always be MDJUD.

4a. Specify ChartField Sort Options. Select the ChartField Sort Options Name criteria for your report (by a selection or range of selections you wish to be included in your report).

As an example, you can report on any single or combination of the following fields:

Account (e.g., 0902 – Office Supplies)

Product (PCA, e.g., 40821)

Budget Ref (Appropriation Year, e.g., AY2015)

Class Fld (Appropriation Number, e.g., A0006 – Admin Office of the Courts)

Fund Code (Fund, e.g., 0001 – General Fund)

Req and PO Budgetary Activity

Run Control ID POACTMITY
Language English

Report Manager Process Monitor **Run**

Report Request Parameters

*Business Unit MDJUD

*Budget Date From 07/01/2016

*To 06/30/2017

Remaining Amount >=

0.000 USD

Business Unit GL MDJUD

ChartField Sort Options



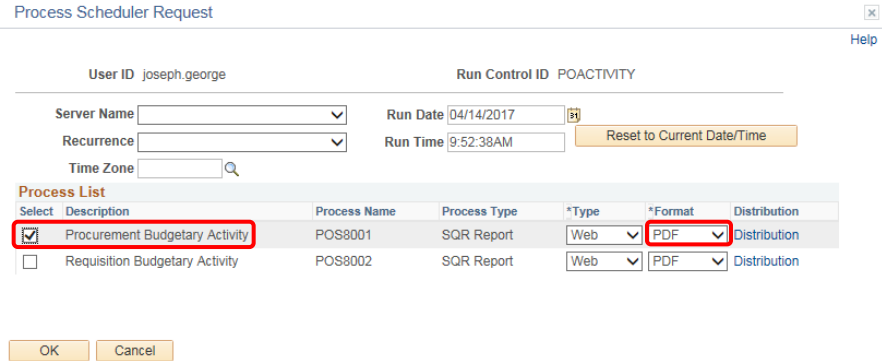
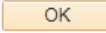
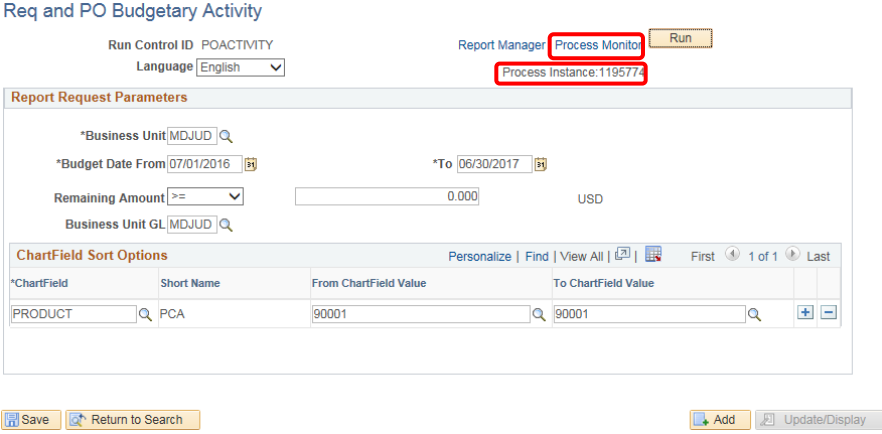


Personalize Find View All 1 of 1 Last

*ChartField	Short Name	From ChartField Value	To ChartField Value
PRODUCT	PCA	90001	90001

Save Return to Search

Add Update/Display

NOTE: The more selection criteria entered, the more granular your results will be. You can select multiple field names. Add/delete field names as needed by using the "+" and "-" buttons to the right of the line.

	<p>Operating Unit (Batch Agency, e.g., C50 Maryland District Court)</p> <p>Program (e.g., B005 – Maryland Judicial Conference)</p> <p>Project ID (NOTE: this field is primarily used with Grants)</p>																			
5.	<p>Run the Report. Click the  button.</p>																			
6.	<p>Schedule the Process. The Process Scheduler Request page displays.</p> <p>Select/Enter the appropriate criteria:</p> <ol style="list-style-type: none"> Click the checkbox <input checked="" type="checkbox"/> next to the Procurement Budgetary Activity. Ensure the report Format is 'PDF'. 																			
7.	<p>Click the  button.</p>																			
8.	<p>Make Sure The Process Runs. The Report Selection Parameters page displays.</p> <p>Make note of your Process Instance Number. In this example, the Process Instance Number is 1195774.</p> <p>Click the Process Monitor link.</p>																			
9.	<p>Check the Process Status. The Process List page displays.</p> <p>Click the  button and continue clicking the Refresh button until the Run Status = Success and Distribution Status = Posted.</p>	 <table border="1" data-bbox="662 1612 1539 1963"> <thead> <tr> <th>Run Status</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>Queued</td> <td>The process is waiting to run.</td> </tr> <tr> <td>Initiated</td> <td>The process has started.</td> </tr> <tr> <td>Processing</td> <td>The process is running.</td> </tr> <tr> <td>No Success</td> <td>The process did not run, call the Help Desk.</td> </tr> <tr> <td>Warning</td> <td>The process ran, but there may be a problem. See if you can retrieve the report, if not, call the Help Desk.</td> </tr> <tr> <td>Success</td> <td>The process ran successfully.</td> </tr> <tr> <th>Distribution Status</th> <th>Description</th> </tr> <tr> <td>Queued</td> <td>The process is waiting to run.</td> </tr> </tbody> </table>	Run Status	Description	Queued	The process is waiting to run.	Initiated	The process has started.	Processing	The process is running.	No Success	The process did not run, call the Help Desk.	Warning	The process ran, but there may be a problem. See if you can retrieve the report, if not, call the Help Desk.	Success	The process ran successfully.	Distribution Status	Description	Queued	The process is waiting to run.
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11.	<p>The Req and PO Budgetary Activity page displays.</p> <p>Click the Report Manager link.</p>	<div>Req and PO Budgetary Activity</div> <div>Run Control ID POACTIVITY</div> <div>Language English</div> <div>Report Manager Process Monitor Run</div> <div>Report Request Parameters</div> <div>*Business Unit MDJUD</div> <div>*Budget Date From 07/01/2016 To 06/30/2014</div> <div>Remaining Amount >= 0.000 USD</div> <div>Business Unit GL MDJUD</div>																																																																																																			
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13.	<p>View the Report. The View Reports page displays.</p> <p>Click the link of the report you wish to view that corresponds to the Process Instance Number that was run.</p> <p>The report will open as a PDF file in a separate window. See below for sample output.</p> <p>*NOTE: The report will only include POs that are Approved and have been budget checked with no errors.</p>	<div>View Reports For</div> <div>User ID Joseph.george x Type Last 1 Days Refresh</div> <div>Status Folder Instance to</div> <div>Report List</div> <div>Personalize Find View All</div> <div>First 1-7 of 7 Last</div> <table><thead><tr><th>Select</th><th>Report ID</th><th>Prcs Instance</th><th>Description</th><th>Request Date/Time</th><th>Format</th><th>Status</th><th>Details</th></tr></thead><tbody><tr><td><input type="checkbox"/></td><td>1146485</td><td>1195774</td><td>Procurement Budgetary Activity</td><td>04/14/2017 11:01:46AM</td><td>Acrobat (*.pdf)</td><td>Posted</td><td>Details</td></tr><tr><td><input type="checkbox"/></td><td>1146484</td><td>1195773</td><td>Procurement Budgetary Activity</td><td>04/14/2017 10:55:50AM</td><td>Acrobat (*.pdf)</td><td>Posted</td><td>Details</td></tr></tbody></table>	Select	Report ID	Prcs Instance	Description	Request Date/Time	Format	Status	Details	<input type="checkbox"/>	1146485	1195774	Procurement Budgetary Activity	04/14/2017 11:01:46AM	Acrobat (*.pdf)	Posted	Details	<input type="checkbox"/>	1146484	1195773	Procurement Budgetary Activity	04/14/2017 10:55:50AM	Acrobat (*.pdf)	Posted	Details																																																																											
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End of Document

This document is intended to provide a quick reference to completing standard transactions within GEARS. Please refer to the appropriate User Procedures and/or online references for any corresponding policies regarding this process.